Marketing 2012

A guide to Report Designer in Horizon.

Horizon 3.299

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1. Introduction

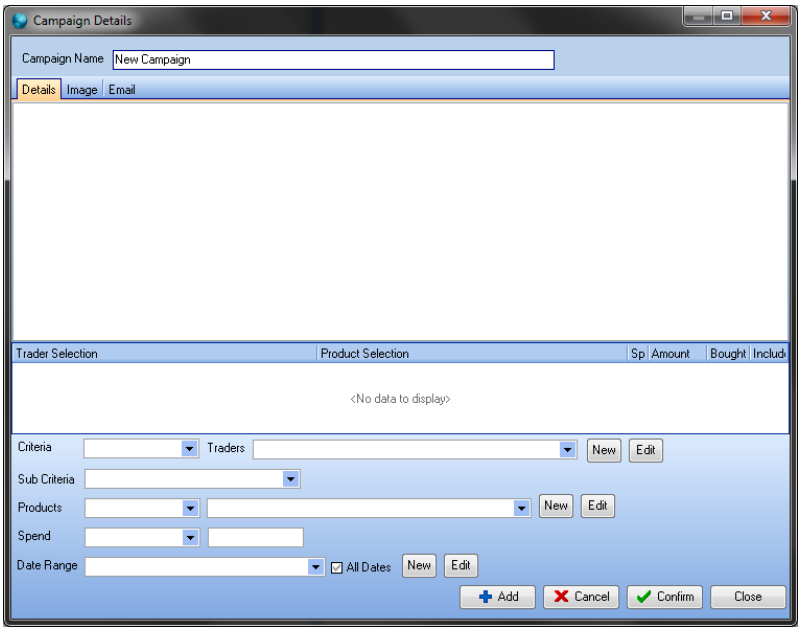
Over the next couple of pages this will display how to use the functionality of the Marketing Module.

2. Manual Campaign

Note: As creator of the campaign you will be the only user able to edit/delete the campaign.

2.1 Creating a new campaign

1. Select the **Add** button.
   You'll then be presented with a new marketing campaign window.



2. Fill in the **Campaign Name**
   This is normally something relating to what the campaign is for so you are able to identify it easily.

3. Fill in the selection criteria for your campaign.

   a. Select your trader selection
      You then have the ability to select if you wish to **Include** or **Exclude** traders from your campaign.

   b. Select your sub-criteria This can beet to one of the following options:

      - None – Enables you to just use the trader selection criteria.
      - Product – Enables you to use selected criteria on which looks at what products traders have bought or have not bought.
      - Branch Spend – Enables you to bring back traders looking at individual branch spend, which have spent 'less than' or 'more than' a specified amount.

- Product Plus Branch Spend – Enables you to do a combined sub criteria search on product and branch spend.

- Account Spend – Enables you to bring back trader looking at the full account spend, which has spend 'less than' or more than a specified amount'.

- Product Plus Account Spend – Enables you to do a combined sub criteria search based on product and account spend.

  *Note: Depending on which option you've selected, you will be presented additional selection criteria for **product** and **spend**.*

c. Finally you need to fill in your date range selection.
   Note: If you don't require to use a date range criteria and want to use all dates, make sure the 'All Dates' tick box is set, otherwise un tick this option.

4. If you are going to email your campaign, you will need to do the following.

   a. You are required to set an image against the 'Image' tab.

   b. You are required to setup your email message on the email tab which will be emailed to your customers. An html editor is provided in this section, however this is quite basic.
      Note: If you require something more advanced to design your marketing email we would advise using a piece of web design software.

5. Once you've set up your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select 'Close'.

2.2 Modifying an existing campaign

If you later wish to modify any of the details in your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Edit** button.

Once you've modified your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select 'Close'.

2.3 Deleting an existing campaign

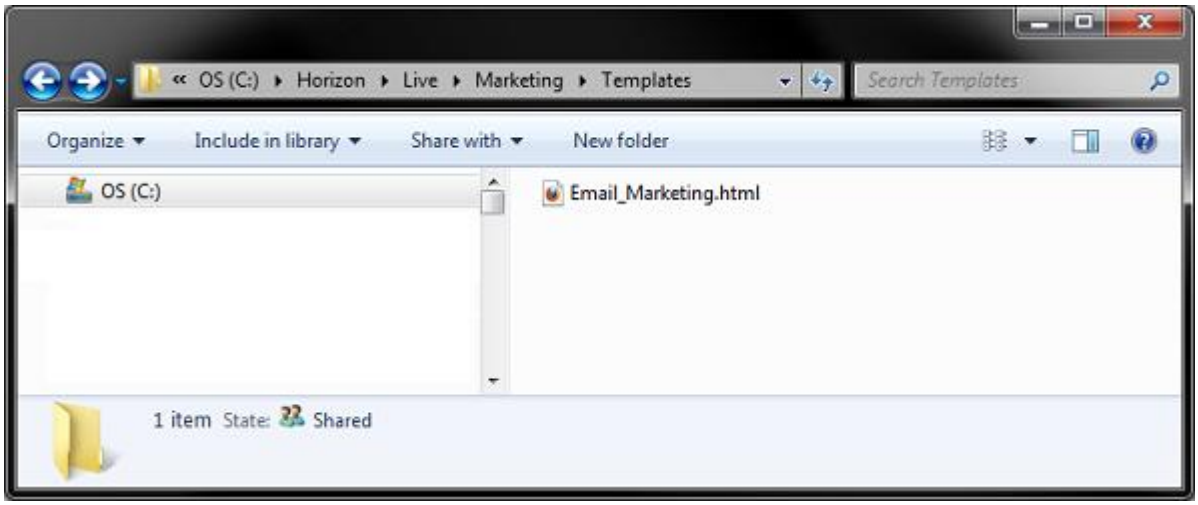
If you later wish to delete your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Delete** button.

3. Fast Campaign

Note: As creator of the campaign you will be the only user able to edit/delete the campaign.

3.1 Setting up your Campaign Template

You need to create a HTML email body template to use this function. This is stored in the live directory within the folders Marketing > Templates. (as seen below)



Within the template you can use the following flag options:

- %line_start% - Is the Starting point of the list
- %line_end% - Is the end point of the list
- %expiry% - Is replaced by the Expiry Date in the Sales Entry
- %code% - Is replaced by the Product Code
- %description% - Is replaced by the Product Description
- %price% - Is replaced by the Price
- %pack% - Is replaced by the Pack Size
- %buynow% - Is replaced by a link to the product on HorizonWeb.

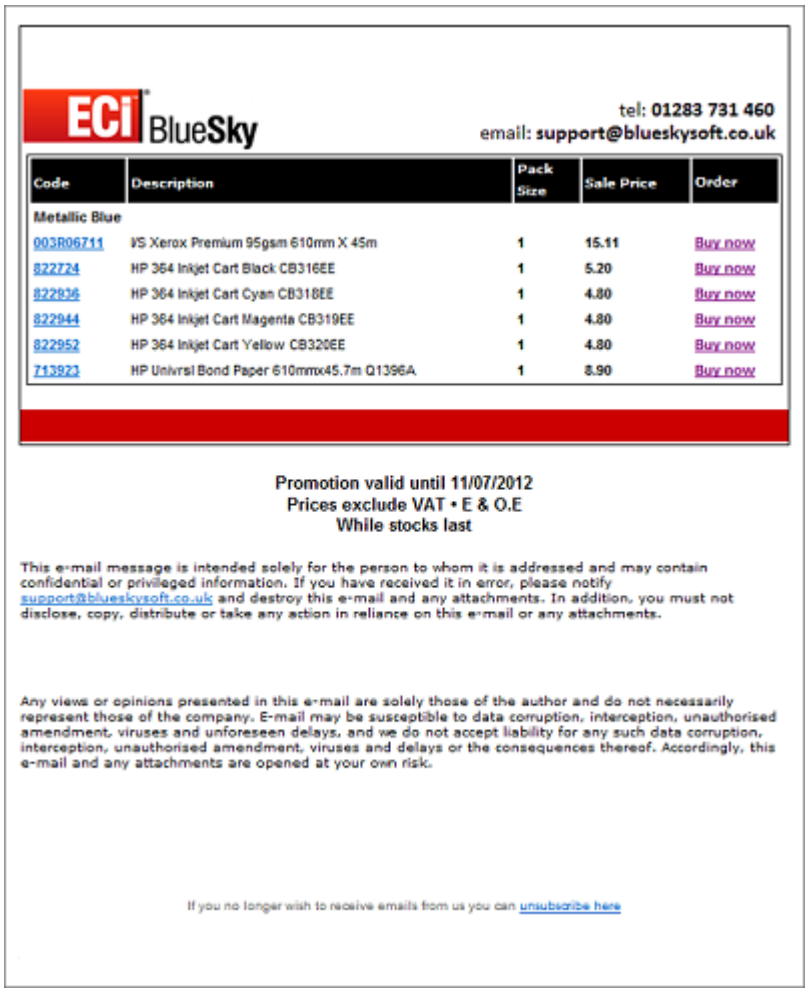
You are also able to use the standard options within Marketing:

- %name% - Customer Name
- %address% - Customer Address
- %date% - Current Date
- %pic% - Trigger Picture
- %contactname% - Contact Name
- %unsubscribe% - Unsubscribe Link
- %salutation% - Customer Salutation
- @login@ - HorizonWeb Login link
- @autologin@ - HorizonWeb Automatic Login link

An example on how to implement these options is to create an html table to use these options (as seen below).

Note: A copy of this file can be obtained from ECi Bluesky Support.

When the marketing email body campaign is ran it would look like this:



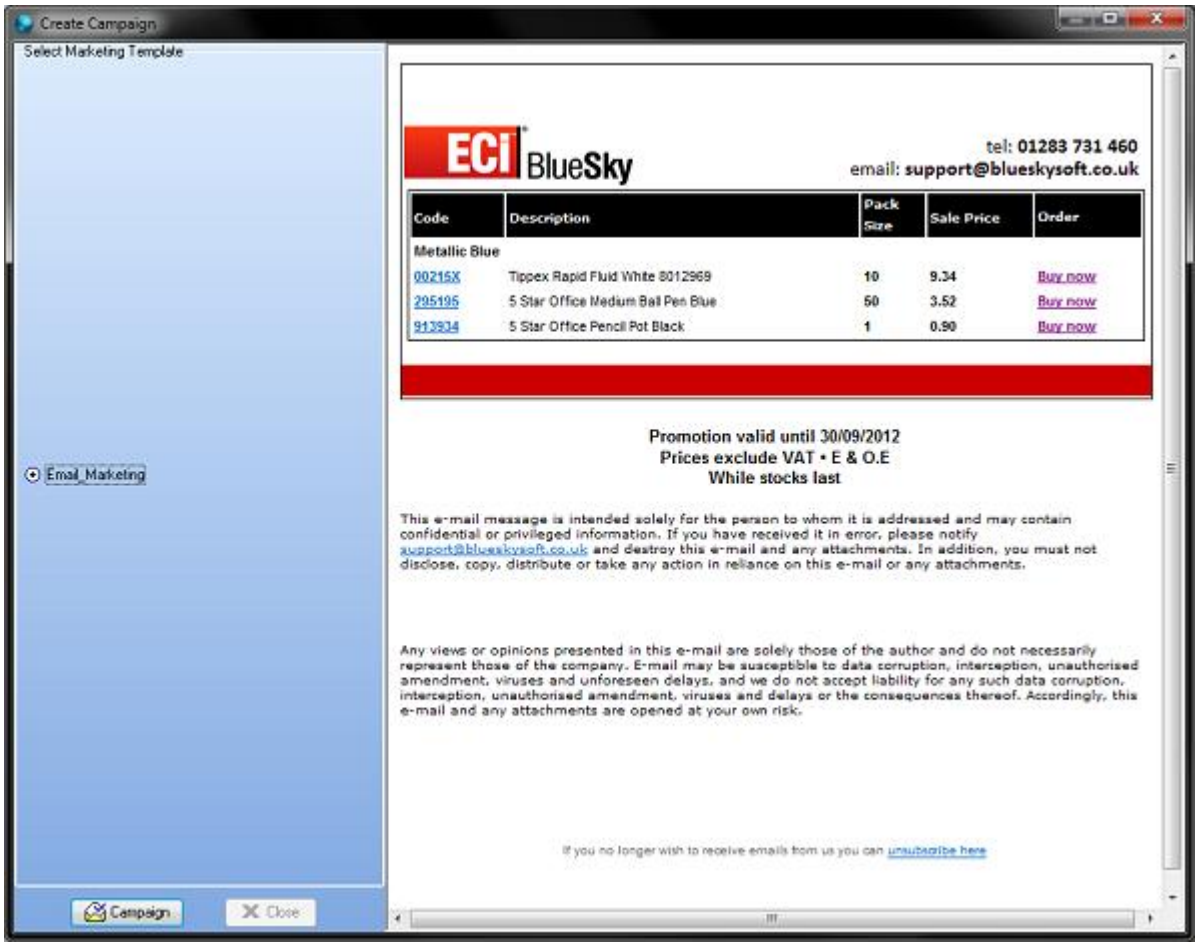
3.2 Creating a Fast Campaign

1. Go into Sales > Sales Contract

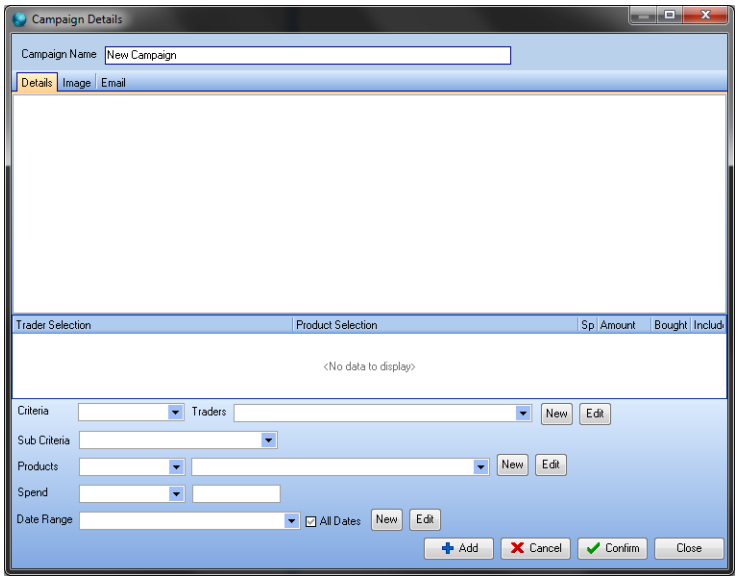
2. Create a Sales Contract
   Note: Create onto your All Deal / Group Deal trader depending on who you wish to get the campaign.

3. Add the codes and modify the prices to what you wish to be displayed in your marketing campaign.

4. Select the **Campaign** button.
   You'll then be presented with the campaign preview screen:

5. Select the **Marketing Template.**
   You'll then be presented with a preview of the Campaign:
   

6. Select the **Campaign** button.
   You'll then be presented with a new marketing campaign window.



7. Fill in the **Campaign Name**
   Note: This is normally something relating to what the campaign is for so you are able to identify it easily.

8. Fill in the selection **Criteria** for your campaign.

   a. Select your **Trader** selection
      You then have the ability to select if you wish to **Include** or **Exclude** traders from your campaign.

   b. Select your **Sub-Criteria** This can beet to one of the following options:

      - None – Enables you to just use the trader selection criteria.
      - Product – Enables you to use selected criteria on which looks at what products traders have bought or have not bought.
      - Branch Spend – Enables you to bring back traders looking at individual branch spend, which have spent 'less than' or 'more than' a specified amount.
      - Product Plus Branch Spend – Enables you to do a combined sub criteria search on product and branch spend.
      - Account Spend – Enables you to bring back trader looking at the full account spend, which has spend 'less than' or more than a specified amount'.
      - Product Plus Account Spend – Enables you to do a combined sub criteria search based on product and account spend.

        *Note: Depending on which option you've selected, you will be presented additional selection criteria for **product** and **spend**.*

c. Finally you need to fill in your **Date Range** selection.

Note: If you don't require to use a date range criteria and want to use all dates, make sure the 'All Dates' tick box is set, otherwise un tick this option.

9. You are required to set an image against the **Image** tab.

10. Once you've set up your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select **Close**.

3.2 Modifying an existing campaign

If you later wish to modify any of the details in your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Edit** button.

Once you've modified your details for your campaign to then save the criteria, you just need to make sure that you've selected 'Confirm' to make it greyed out, and then select 'Close'.

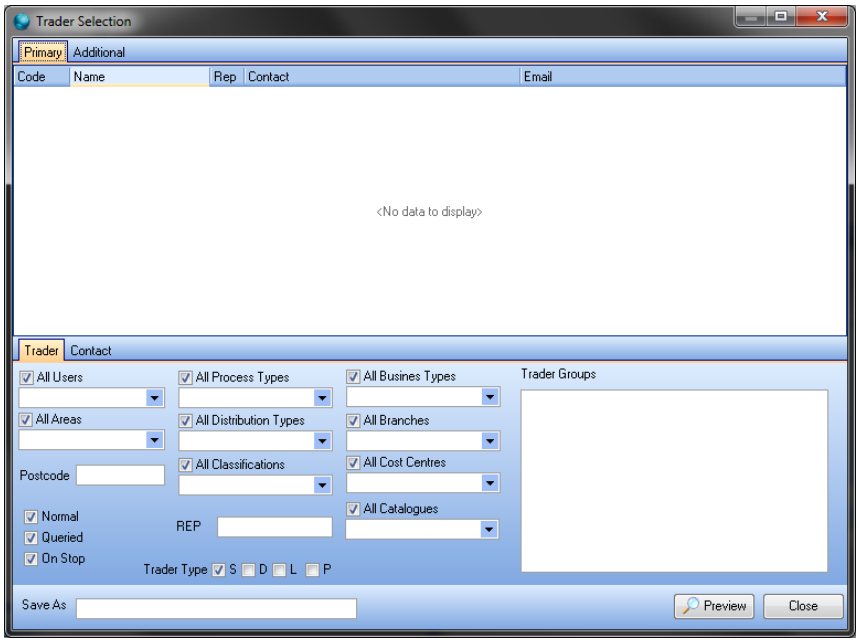
3.3 Deleting an existing campaign

If you later wish to delete your marketing campaign, all you need to do is highlight your campaign in the list and then select the **Delete** button.

4. Trader Criteria

4.1 Creating a new trader list.

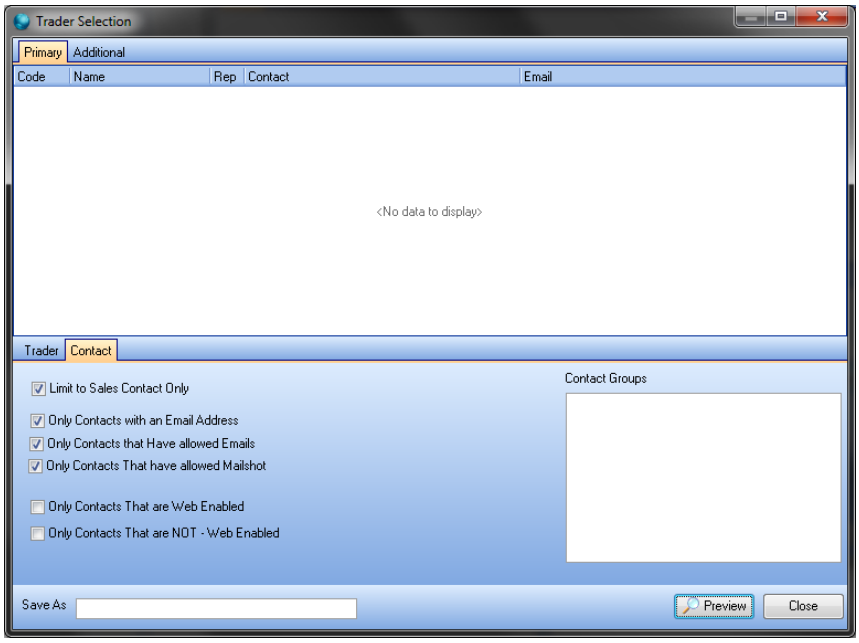
Select the **New** button next to the drop down box for the Trader criteria in your campaign.



This defaults you to your **Primary** trader selection criteria, this enables you to fill in your criteria for trader selection. This is based on:

- Users – *Account Manager set against the Trader.*
- Areas – *Area set against the Trader.*
- Process Types – *Process Type set against the Trader.*
- Distribution Types – *Distribution Type set against the Trader.*
- Classifications – *Classification set against the Trader.*
- Business Types – *Business Type set against the Trader.*
- Branches – *Branch of the Company set against the Trader (Used if Multi-Branched)*
- Cost Centres – *Company Cost Centre set against the Trader.*
- Catalogues – *Catalogue that the Trader is distributed against (Catalogue has to be distributed to the Trader for this option to work).*
- Post Code – *Enables you to search for all Traders in a specific Post Code Area (Works with partial and full Post Codes.)*
- Rep – *Enables you to search for all Traders with a specific Rep Code.*
- Trader Type – *Enables you to search for all Sales, Delivery, Lead and Purchase Trader.*
- Trader Status – *Enables you to select Traders that are Normal, Queried or On Stop.*
- Trader Groups – *Enables you to select from the Trader Groups you've setup.*

You can preview the trader selection from the details you've entered by pressing the **Preview** button.



You can then define on the **Contacts** tab the contact selection from the traders that you've selected on the **Trader** tab. This is based on:

- Limit to Sales Contact Only – *If ticked will only show the Contact set as the **Sales Contact** against the trader, otherwise will show all Contacts.*

- Only Contacts with Email Address – *If ticked will only show the Contacts with an email address set against them.*
- Only Contacts that have allowed Emails – *If ticked will only show the Contacts with **Allow Email** ticked.*
- Only Contacts that have allowed Mailshot – *If ticked will only show the Contacts with **Allow Mailshot** ticked.*

- Only Contacts that are Web Enabaled – *If ticked will only show the Contacts that have **Web Enabled** ticked.*
- Only Contacts that are not Web Enabaled – *If ticked will only show the Contacts that do not have **Web Enabled** ticked.*

You can preview the contact selection from the details you've entered by pressing the '**Preview'** button.

To then save these details, place a reference into the '**Save As'** field, something relating to what the trader selection so you instantly know what the selection is so you know what it is for future use.

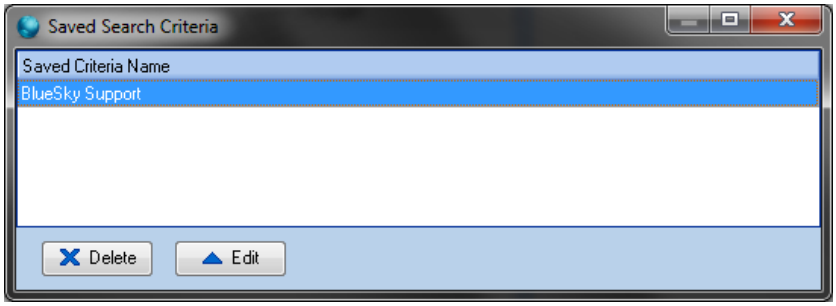
4.2 Modifying saved trader search criteria inside a campaign.

When in your marketing campaign and you require to modify the trader selection that you want to use. If you select the trader selection from the drop down box and then select the 'Edit' button, this will bring up the trader criteria screen so you can modify the selection.

4.3 Modifying saved trader search criteria outside a campaign.

When you're in the Marketing screen, you are able to simply modify trader search criteria without entering your campaign.

To do this you simply have to click on the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

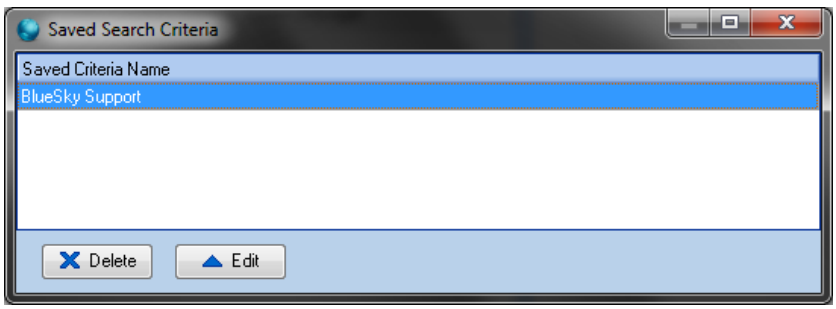


To then edit one of your saved criteria, highlight the saved criteria you wish to modify and then select the **Edit** button, this will bring up the trader criteria screen so you can modify the selection.

4.4 Deleting saved trader search criteria.

If you no-longer require a saved criterion in Marketing and wish to delete it so it does come up for selection in a campaign.

In the Marketing screen, select the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

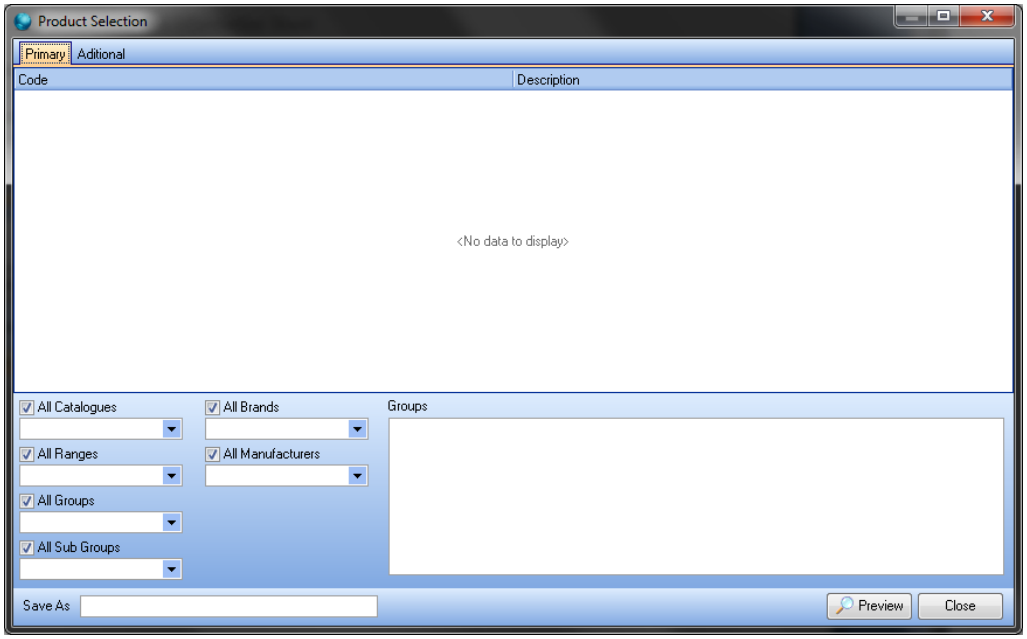


To then delete one of your saved criteria, highlight the saved criteria you wish to delete and then select the **Delete** button.

5. Product Criteria

5.1 Creating a new product selection criteria.

In the sub criteria when you select an option including **Product**, you will then be presented with an additional field for **Products**. Select the **New** button next to the drop down box for the Products criteria in your campaign.



This defaults you to your **Primary** Product selection criteria, this enables you to fill in your criteria for product selection. This is based on:

- Catalogue – Enables you to select which Catalogue you wish to use for your campaign.
- Ranges – Enables you to select which Range of products you wish to use for your campaign.
- Groups – Enables you to select from the Groups associated to which Range you've selected.
- Sub-Groups – Enables you to select from the Sub-Groups associated to which Group you've selected.
- Brands – Enables you to pick a specific brand of products.
- Manufacturers – Enables you to pick a specific manufacturer of products.
- Groups – Enables you to pick products that are in a specific product group.

You can preview the trader selection from the details you've entered by pressing the 'Preview' button.

To then save these details, place a reference into the **Save As** field, something relating to what the product selection criteria so you instantly know what the selection is so you know what it is for future use.

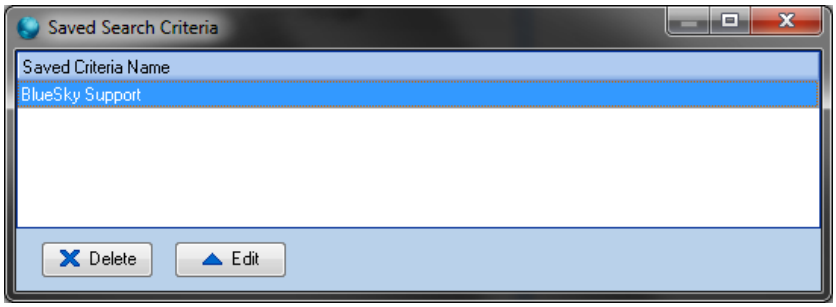
5.2 Modifying saved product selection criteria inside a campaign.

When in your marketing campaign and you require to modify the product selection that you want to use. If you select the product selection from the drop down box and then select the **Edit** button, this will bring up the product criteria screen so you can modify the selection.

5.3 Modifying saved product selection criteria outside a campaign.

When you're in the Marketing screen, you are able to simply modify product selection criteria without entering your campaign.

To do this you simply have to click on the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

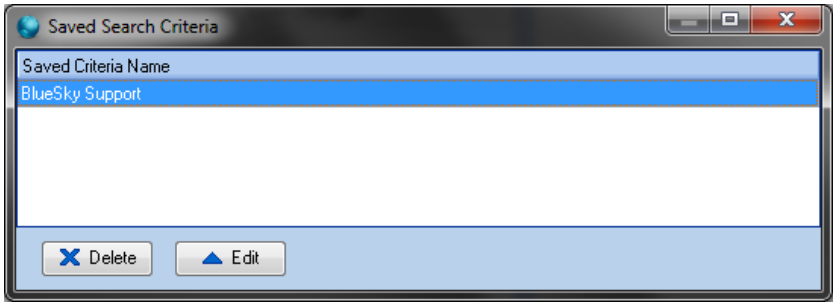


To then edit one of your saved criteria, highlight the saved criteria you wish to modify and then select the **Edit** button, this will bring up the trader criteria screen so you can modify the selection.

5.4 Deleting product selection criteria.

If you no-longer require a saved criterion in Marketing and wish to delete it so it does come up for selection in a campaign.

In the Marketing screen, select the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

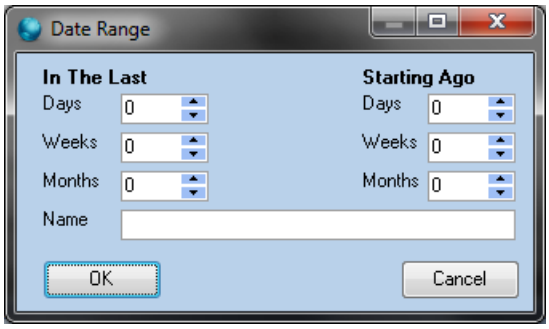


To then delete one of your saved criteria, highlight the saved criteria you wish to delete and then select the **Delete** button.

6. Date Range Criteria

6.1 Creating a new date range.

Select the **New** button next to the drop down box for the Date Range in your campaign.



This brings up the date range selection screen.

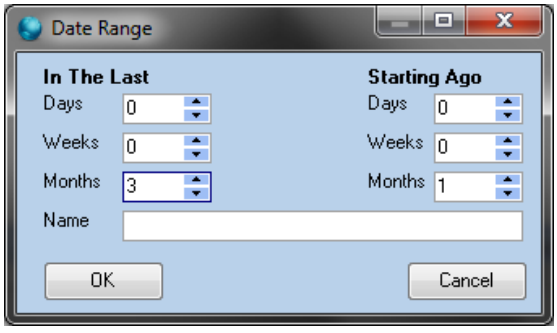
On this screen there are two sections to your date selection **In The Last** and **Starting Ago.**

- In the Last – This is your selection for how far back you wish to look at. This works in conjunction with the 'Starting Ago'.

- Starting Ago – This is when you want the system to start looking at the data from e.g. If you left as '0' it would look from the current date, however if you set Months to 1, it would look at data from a month ago.

Example:

Note: Written on 20/02/2011



With the above date range selection set. It would start looking at data in Horizon a month ago – 20/01/2011 and then look back over the system at the data placed in the last 3 months, meaning the ending date for the date range would be 20/11/2010.

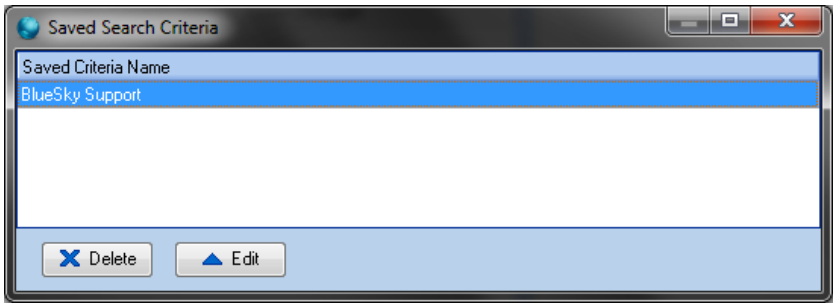
6.2 Modifying a saved date range inside a campaign

When in your marketing campaign and you require to modify the date range that you want to use. If you select the date range from the drop down box and then select the **Edit** button, this will bring up the date range screen so you can modify your date range.

6.3 Modifying a saved date range outside a campaign.

When you're in the Marketing screen, you are able to simply modify your date range without entering your campaign.

To do this you simply have to click on the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.

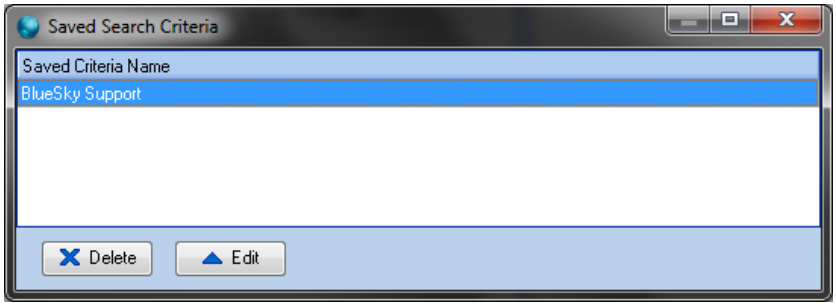


To then edit one of your saved criteria, highlight the saved criteria you wish to modify and then select the 'Edit' button, this will bring up the trader criteria screen so you can modify the selection.

6.4 Deleting a saved date range.

If you no-longer require a saved criterion in Marketing and wish to delete it so it does come up for selection in a campaign.

In the Marketing screen, select the **Saved Criteria** option. This will then bring up a box with all your saved criteria in.



To then delete one of your saved criteria, highlight the saved criteria you wish to delete and then select the **Delete** button.

7. Marketing Image Details

7.1 What is the Image used for.

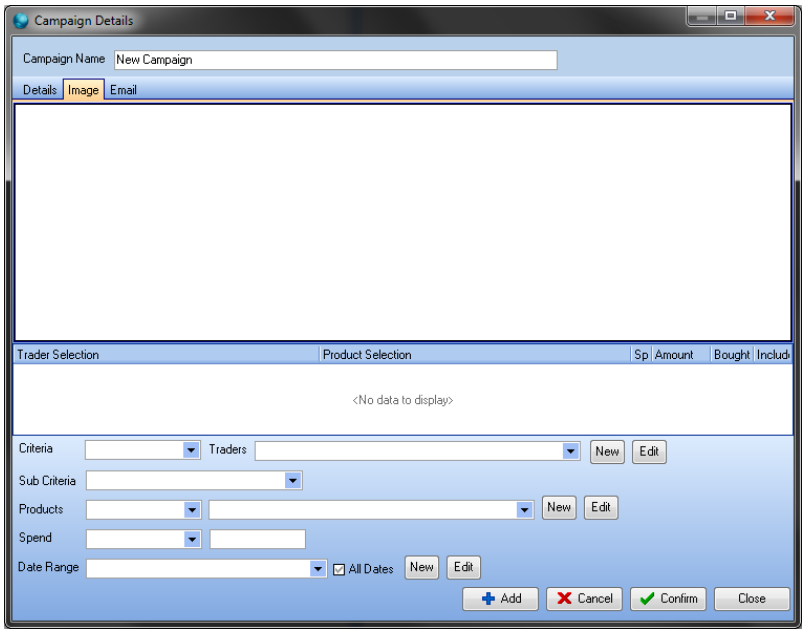
The image is used as a trigger, which enables you to know if your customer has read your marketing campaign or not. This can be seen on the main screen of the marketing in the contacts list for the campaign.

7.2 How do I add in an image onto my campaign.

To add an Image onto your campaign:

1. Go onto the **Image** tab in your campaign.
2. If you then right click on the box and select 'Load'.
3. Then browse to your image you wish to be used as your Trigger Image and confirm.
4. This will then bring it into the Image box.
5. Select the **Confirm** button in your campaign to confirm your image selection.

Note: You can use whatever image you wish as your trigger image, this can be a small 5x5 white pixel image, your company logo, or you're main Image used for your campaign there are no limits.



7.3 How to modify your image in your campaign.

To modify the image you've uploaded into your campaign, right click on the image; you will then be presented the options to perform the following tasks:

- Cut
- Copy
- Paste
- Delete
- Load
- Save As

Once you've made any modifications to the image select the confirm button, to save any changes.

7.4 How to link the Image into your marketing email.

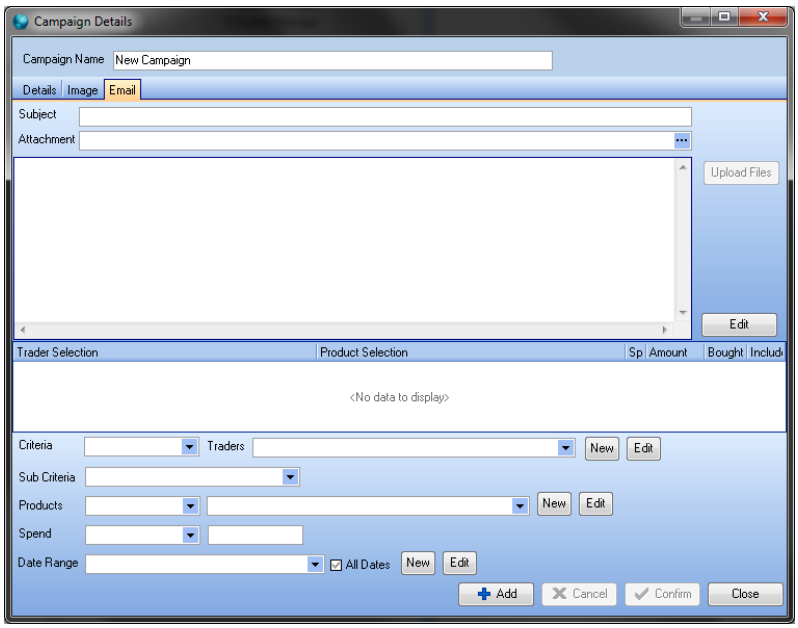
To link the image into your marketing email, you just need to include the **%pic%** variable into your email. When you process your campaign the **%pic%** variable will automatically swap for your trigger image.

8. Marketing Email

8.1 Creating your marketing email.

To setup your marketing email you need to go onto the **Email** tab in your campaign.

Note: When designing your marketing email it is best to get all the images ready that you wish to use and store them somewhere easy assessable.

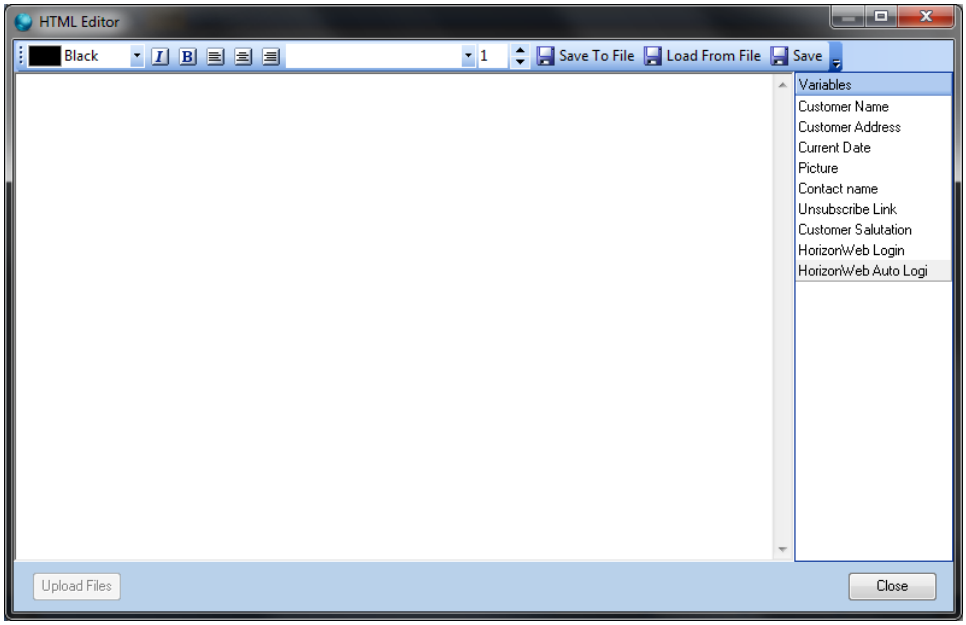


Once you have the images and the text ready you can start designing the marketing email. Marketing has a built in HTML editor which will allow you to create flyers and promotional emails.
This will allow you to insert images, text with different colours and fonts etc.

Note: If you wish to be more adventurous you can use a more advanced editor which will allow you to put things in like tables and use more fonts. Most editors come with preview modes so you can preview your flyer. It is then very easy to load the HTML created in the editor into Horizon.

To start creating your marketing email, you initially need to place a **Subject**; this will be the first thing the customer see before opening the email.

Now click on the **Edit** button, this will pop up the HTML Editor screen.



You should now see the above seen. You can now add your text, and modify the font style, font size, colouring, indentation.

To insert an image all you need to do is right click on a blank area and select the option 'Insert Image'. All you then need to do is browse to the image you wish to use.

Note: All Images used will need to be uploaded onto your HorizonWeb box. You will also have to adjust the path to your image once you have saved your marketing email in the HTML Editor.

Once you are happy with your marketing email layout, click on the 'Save' button to save your work. If you do not select this option and just exit, all work you have done will be lost.

8.2 How to upload Images to your HorizonWeb box.

To upload the images click on the Upload Images button whilst in the HTML editor. Select the image you want to upload and then click upload.

Note: You can select multiple images by holding down the CTRL key.

8.3 Adjusting the path on your Image.

Once you have uploaded the image to the web server you have to make a small adjustment to the html code so that the image is viewable on the web.

For every image you have included in the HTML you need to make an alteration to the link before the image.

For example:

<img src="C:\Users\BlueSky\Desktop\00215X.gif">

As you can see in the above example in this line in your html, the image being referenced to is sat on your desktop. The actual image you want to reference is sat on your HorizonWeb box so you need to edit and change the html to reflect this.

<img src="http://xx.xx.xx.xx/Images/00215X.gif">

xx.xx.xx.xx is the external ip address of your HorizonWeb box as given to you earlier in this document.
The Images folder is where the images(s) are uploaded to on your HorizonWeb box. You need to repeat this process for every image you have uploaded.

8.4 Variables available for your marketing email.

There are a range of variables available that can be used in your marketing email that brings in details of the customer into the email. These are as followed:

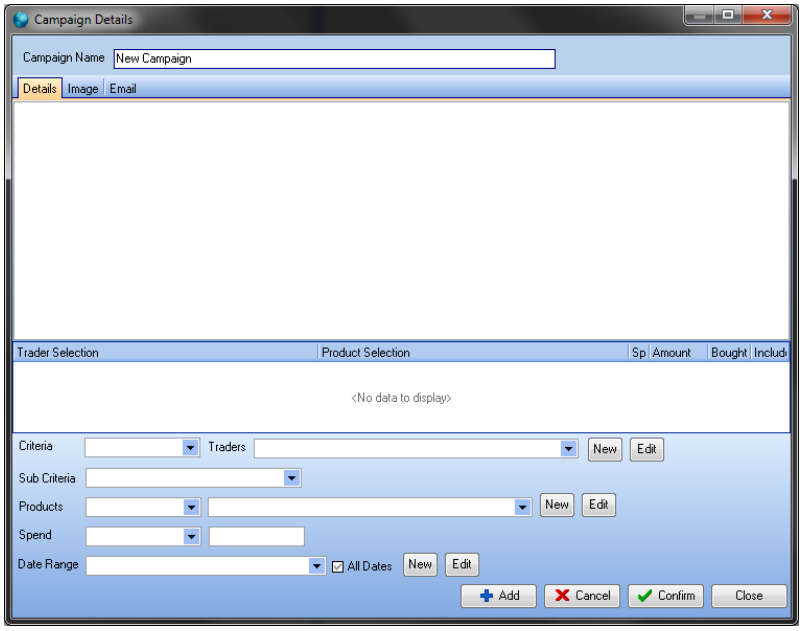
- %name% - Customer Name
- %address% - Customer Address
- %date% - Current Date
- %pic% - Trigger Picture
- %contactname% - Contact Name
- %unsubscribe% - Unsubscribe Link
- %salutation% - Customer Salutation
- @login@ - HorizonWeb Login link
- @autologin@ - HorizonWeb Automatic Login link

9. Online Campaign

9.1 How do I show my campaign when a customer logs into HorizonWeb?

To setup your campaign so it shows when the customer logs into HorizonWeb, you need to create your campaign as normal.

In the Campaign Name field you need to place a *. This is then interpreted to display as the logged in message to the customers that meet the campaign criteria.



Note: The email message that you've designed on the email tab is displayed as the logged in message on HorizonWeb.

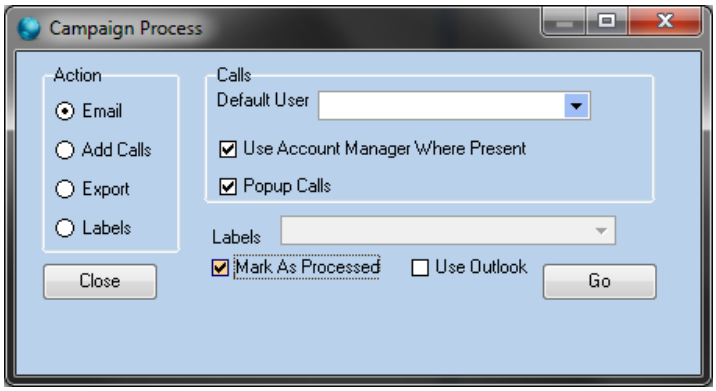
10. Processing Campaigns

10.1 Emailing Your Campaign

Before sending the email to a large group of customers it is important to send it to a small sample to ensure that the links and format of the email look good.

Note: The test email must be sent to someone outside the building and not someone internally as the images may not be recognized when you open the email.

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.



Select the action to **Email**, you are also offered the options of sending straight out via Horizon or using Outlook.

If you wish to send out the marketing email via outlook tick the **Use Outlook** option otherwise the emails will be sent out through Horizon.

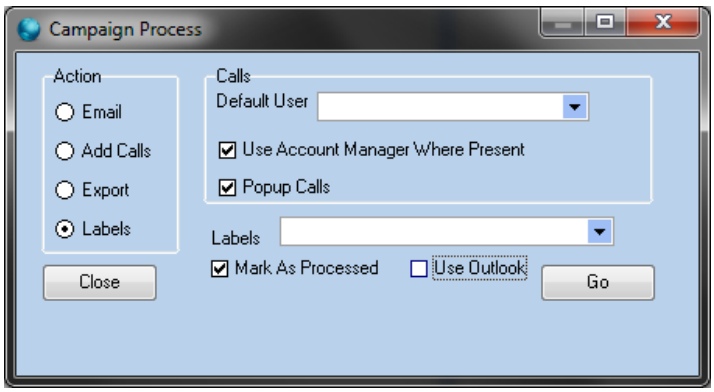
Note: Using Outlook has better traceability as a copy of the email is stored in your Outlook Sent folder.

Press **Go** to process your campaign.

Once the email shot has been processed it will move the campaign into the **Processed** section. Unless you've un-ticked the **Mark As Processed** option on the **Campaign Process** screen.

10.2 Creating Labels From Your Campaign

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.



Select the action to **Labels**.

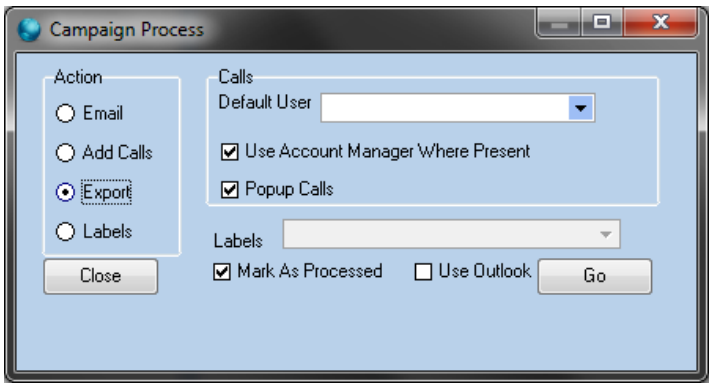
The drop down box will then be activated for you to select the type of labels that you are using so they get printed off in the correct format.

Press **Go** to process your campaign.

Once the labels have been created it will move the campaign into the **Processed** section. Unless you've un-ticked the **Mark As Processed** option on the **Campaign Process** screen.

10.3 Exporting the List Of Customers From Your Campaign

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.



Select the action to **Labels**.

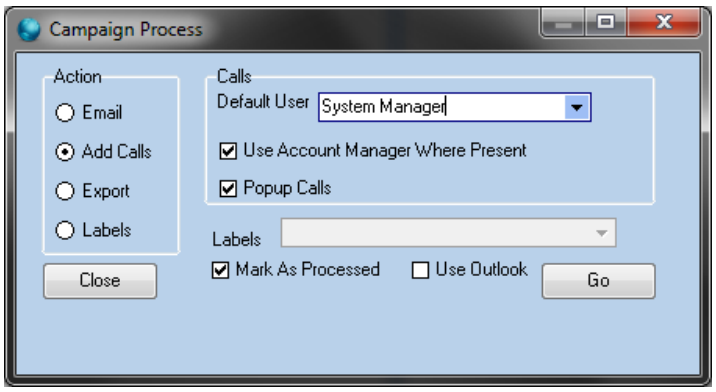
The drop down box will then be activated for you to select the type of labels that you are using so they get printed off in the correct format.

Press **Go** to process your campaign.

Once the labels have been created the campaign is moved into the **Processed** section. If you've un-ticked the **Mark as Processed** option on the **Campaign Process** screen the campaign will not be moved into the **Processed** section.

10.4 Creating Automatic Calls for A Campaign

Select the Campaign you wish to process and then select the **Process** button. You will then be presented with the **Campaign Process** screen.



Select the action to **Add Calls**.

This will then activate the **Calls** Section.

Select the Default User, to the main contact on the system you wish the Calls to be created for.

If you tick the option for **Use Account Manager Where Present** it will then create the call for the Contact as the Account Manager, if there isn't one set it will create it for the Default User.

Once created these calls will be visible in the Call Manager screen and also on the Trader's Call overlay tab.

10.5 Using Calls to Manage Your Campaign

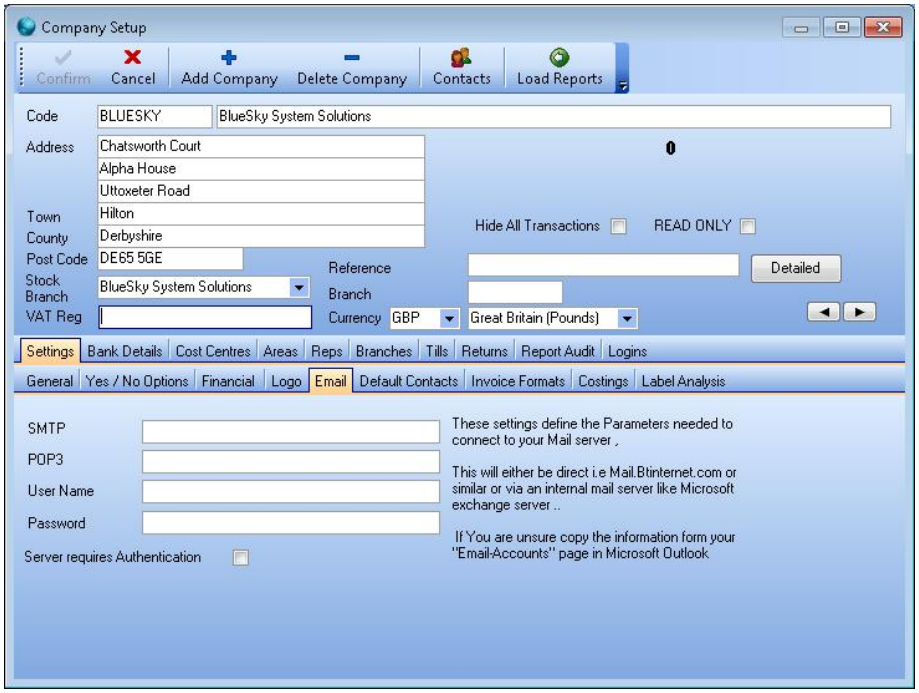
Once you have emailed out your marketing campaign you may want to follow this up with a campaign of telesales or you may be just interested in finding out who doesn't buy something and then following up with a telephone campaign.

From Horizon we are able to see who has opened an email. If we know who has opened the email we may want to follow this up with a phone and create some automatic calls via the call manager to aid with the call management.

11. Other Details

11.1 Setup email settings

Select the **Settings** tab in the Setup Company and then 'Email' (as seen below).

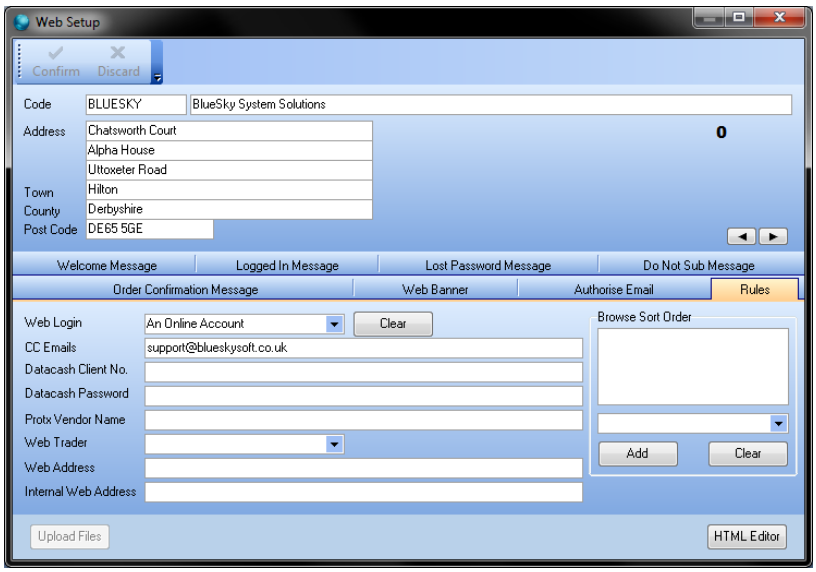


In here you are required to set up your email information. This means that all emails from Horizon and HorizonWeb will be able to be sent to your customers.

You are asked for you STMP, POP3, Login and Password to be entered. These will be available from your Internet Service Provider (ISP). If your server requires authentication when sending emails, please tick the tick box provided.

11. 2 Setup web address / internal IP address

In Horizon if you go into **Setup** and then select **Web**.
This will then pop up the **Web Setup** and display the **Rules** tab.



Place your internal IP address in the 'Internal Web Address' section and then fill in the 'Web Address' with either your external IP address or domain name.